MARYLAND JUDICIARY

GEARS
General Enterprise And Resource Support

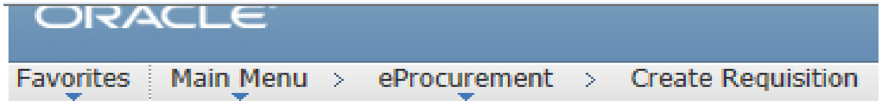
Quick Reference Tip Sheet

LAST REVISED DATE: 01/05/2016

General Information

Task	Process Information
Creating an eProcurement Requisition	A requisition is created in the eProcurement module for goods/services. **NOTE - for AOC, District Court, Circuit Courts, Appellate Courts, and Programs:** Per the FY15 Procurement Policy Change, Receipts will no longer be REQUIRED for Services under Corporate POs (POs created by DPCGA). However, receipts are required for all Goods received, and POs created by DPCGA for Goods will be set to Receipt Required. If you have purchases from a vendor for both Goods and Services, please make sure you create separate lines on your Requisition, so separate lines will be created on your PO. If there is any question by DPCGA as to whether the item is considered Goods or Services, the PO will default to Receipt Required. The Line Details on your PO will indicate if receiving is required. If you want Receipts for Services on your PO, please indicate this request on your Requisition.

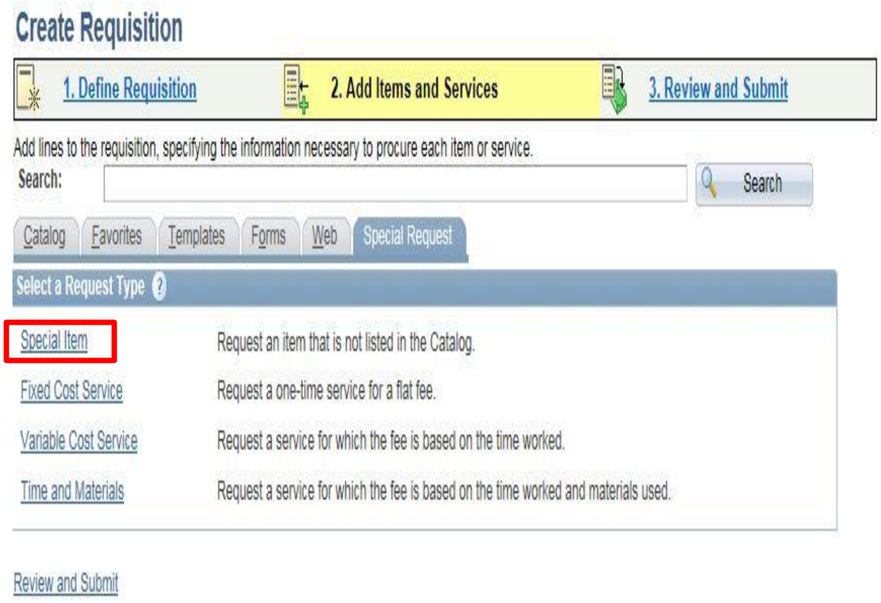
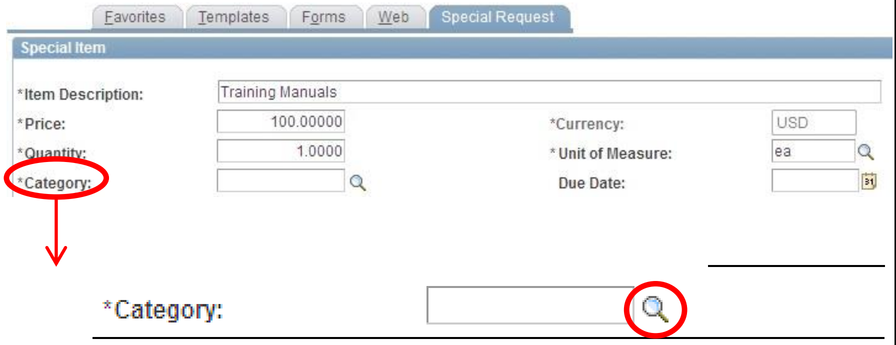
GEARS Navigation

eProcurement > Create Requisition	 ORACLE Favorites Main Menu eProcurement Create Requisition

1.0 Process

This document is intended to provide a quick reference to completing standard transactions within GEARS.

STEP	ACTION	DETAILS
1.	**On the** 1. Define Requisition **screen, define your requisition by giving it a name.**	**NOTE**: It is important to give your requisition a meaningful name to make it easier to find later. Be sure to start the Requisition Name with the corresponding AY year. For example, *AY15 Sharp Maint Renew*. Requisition Name:
2.	**Click the** Continue **button.**	

3.	**On the 2. Add Items and Services screen, click the Special Item link.**	 Create Requisition 1. Define Requisition — 2. Add Items and Services — 3. Review and Submit Add lines to the requisition, specifying the information necessary to procure each item or service. Search: Catalog | Favorites | Templates | Forms | Web | Special Request Select a Request Type Special Item — Request an item that is not listed in the Catalog. Fixed Cost Service — Request a one-time service for a flat fee. Variable Cost Service — Request a service for which the fee is based on the time worked. Time and Materials — Request a service for which the fee is based on the time worked and materials used. Review and Submit
4.	**Add items and services.**	Fill in all fields marked with an asterisk (Item Description, Price, Quantity, and Unit of Measure). **NOTE: See below for Category.**  Favorites | Templates | Forms | Web | Special Request Special Item *Item Description: Training Manuals *Price: 100.00000 *Currency: USD *Quantity: 1.0000 *Unit of Measure: ea *Category: Due Date: *Category: You can search for the Category by selecting the magnifying glass 🔍 .
5.	**On the Create Requisition Look Up Category screen.**	Choose either **Search Categories** or **Browse Category Tree** to look up the appropriate category for your requisition.

5a.

NOTE: Do either 5a or 5b.

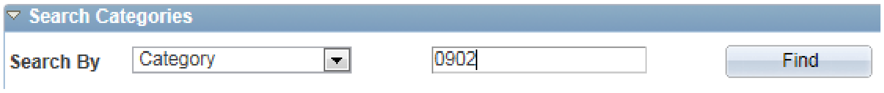
To **Search Categories**

For FY16 transactions and forward:
The **MDJUD Item Catalog** and the associated categories used on Requisitions, Express POs and POs is being replaced with a new catalog **MDJUD Item Catalog NEW**. The category codes contained in this new catalog are the same as our existing account codes. This enhancement is intended to eliminate some of the guesswork in choosing a category. If you know the appropriate account code for your purchase, the category code will be the same.

For example, if the account code to be used on your requisition line is 0902 (Office Supplies), you would choose 0902 as the category.

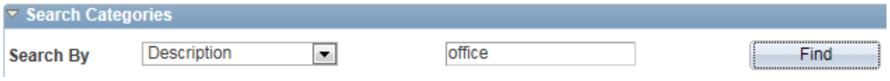
NOTE: The **JIS Item Catalog** (for IT Equipment/Services) and the **District Court Item Catalog** (for Police Supplies) will remain the same. Please continue to use these where appropriate. For example, if you are ordering IT equipment or services that need to be routed to JIS for approval, you should choose a category from the JIS Item Catalog as you do today.

- Use the "Search By" dropdown list to search for goods/services by Category or by Description and then enter the item you wish to procure.



Search Categories
Search By: Category
0902

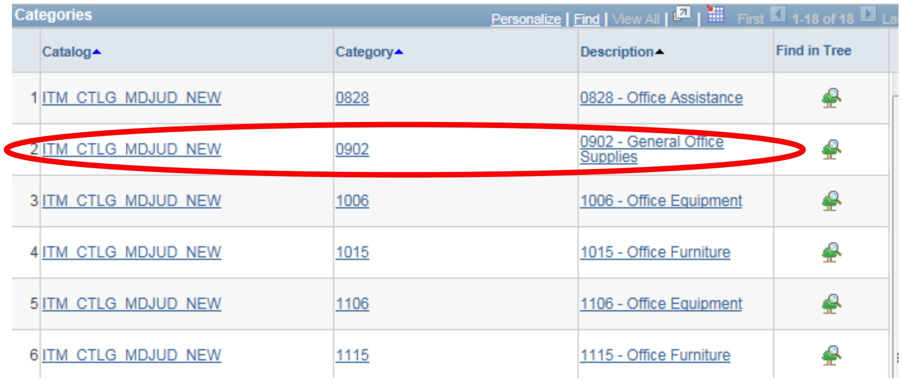
- OR -



Search Categories
Search By: Description
office

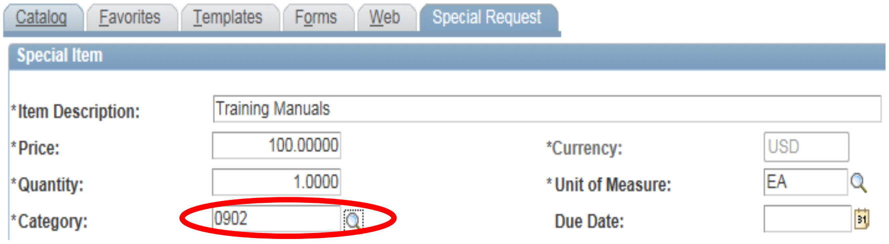
- Click the **Find** button to return a list of results based on your entry.

- Select the row containing the good/service you wish to procure.



	Catalog	Category	Description	Find in Tree
1	ITM_CTLG_MDJUD_NEW	0828	0828 - Office Assistance	
2	ITM_CTLG_MDJUD_NEW	0902	0902 - General Office Supplies	
3	ITM_CTLG_MDJUD_NEW	1006	1006 - Office Equipment	
4	ITM_CTLG_MDJUD_NEW	1015	1015 - Office Furniture	
5	ITM_CTLG_MDJUD_NEW	1106	1106 - Office Equipment	
6	ITM_CTLG_MDJUD_NEW	1115	1115 - Office Furniture	

- Your selection will appear in the Category field on the "Add Items and Services" screen.



Special Item
*Item Description: Training Manuals
*Price: 100.00000
*Quantity: 1.0000
*Category: 0902
*Currency: USD
*Unit of Measure: EA
Due Date:

5b.

NOTE: Do either 5a or 5b.

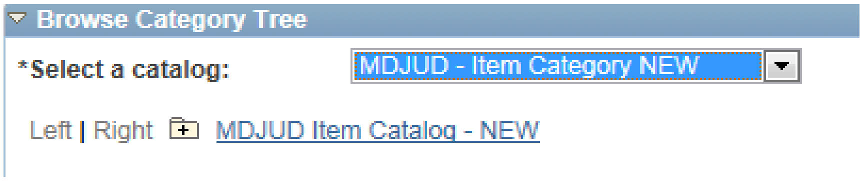
To Browse Category Tree

For FY16 transactions and forward: The **MDJUD Item Catalog** and the associated categories used on Requisitions, Express POs and POs is being replaced with a new catalog **MDJUD Item Catalog NEW**. The category codes contained in this new catalog are the same as our existing account codes. This enhancement is intended to eliminate some of the guesswork in choosing a category. If you know the appropriate account code for your purchase, the category code will be the same.

For example, if the account code to be used on your requisition line is 0902 (Office Supplies), you would choose 0902 as the category.

NOTE: The **JIS Item Catalog** (for IT Equipment/Services) and the **District Court Item Catalog** (for Police Supplies) will remain the same. Please continue to use these where appropriate. For example, if you are ordering IT equipment or services that need to be routed to JIS for approval, you should choose a category from the JIS Item Catalog as you do today.

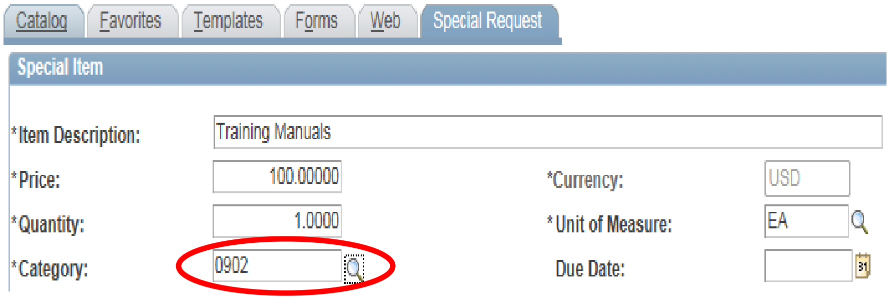
- Expand the section by clicking the ▷.
- Select a catalog from the dropdown list and click the ⊞ to browse the categories within.


Browse Category Tree

*Select a catalog: MDJUD - Item Category NEW

Left | Right ⊞ MDJUD Item Catalog - NEW

- Select the row containing the good/service you wish to procure.
- Your selection will appear in the Category field on the "Add Items and Services" screen.



*Item Description: Training Manuals

*Price: 100.00000

*Quantity: 1.0000

*Category: 0902

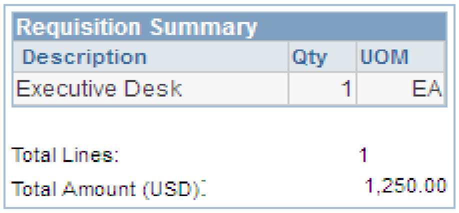
*Currency: USD

*Unit of Measure: EA

Due Date:

6. **Click the** Add Item **button.**

7. **Confirm your selections in the cart.**

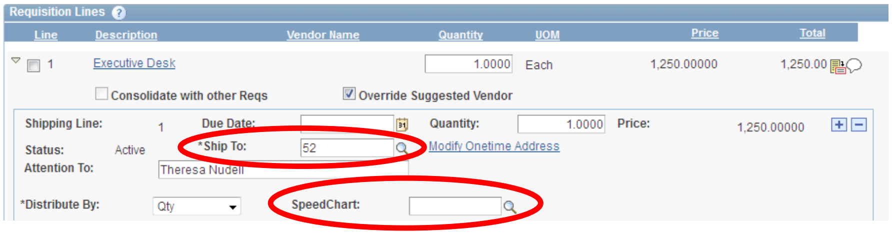
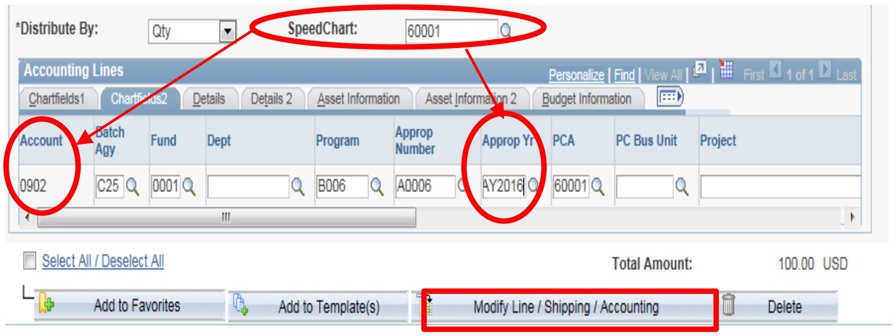

Requisition Summary

Description	Qty	UOM
Executive Desk	1	EA

Total Lines: 1

Total Amount (USD): 1,250.00

8. **Click the** 3. Review and Submit **link.**

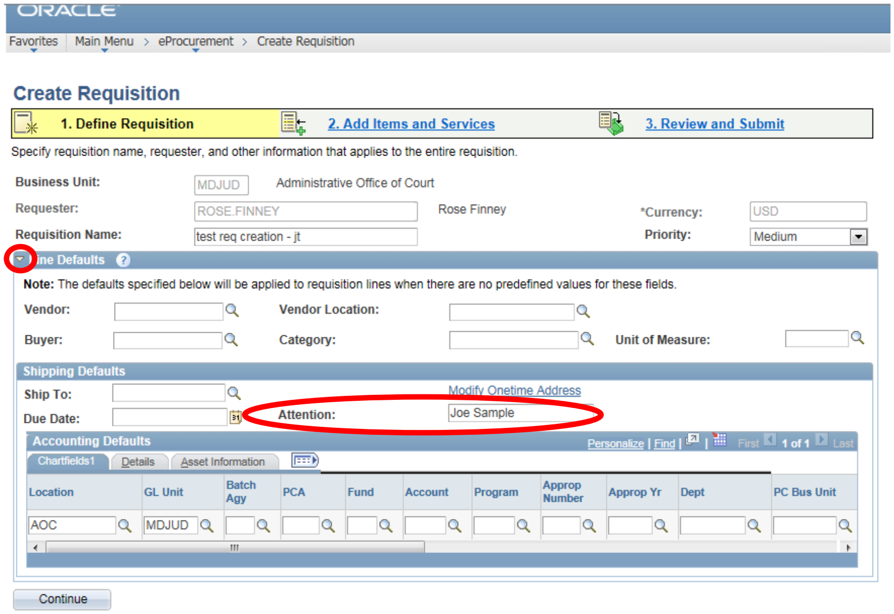
9.	**On the** **3. Review and Submit** **screen, confirm your Requisition Lines.**	- Confirm required fields for the requisition line item by clicking the ▷ to expand the section.
10.	**Enter Ship To and Accounting Line information.**	- Enter your Ship To information. - Select your PCA (SpeedChart Key) from the SpeedChart field using the magnifying glass icon.  Requisition Lines Line: 1 · Description: Executive Desk · Vendor Name: · Quantity: 1.0000 · UOM: Each · Price: 1,250.00000 · Total: 1,250.00 ☐ Consolidate with other Reqs ☑ Override Suggested Vendor Shipping Line: 1 · Due Date: · Quantity: 1.0000 · Price: 1,250.00000 Status: Active · *Ship To: 52 · Modify Onetime Address Attention To: Theresa Nudell *Distribute By: Qty · SpeedChart: - **Note**: The selection of a SpeedChart will fill in your accounting codes in the Chartfields2 tab with the exception of the “Account” (i.e. sub-object) and “Approp Yr” (i.e. fiscal year). - **For FY16 transactions and forward (EXCEPT FOR JIS AND DC POLICE SUPPLIES):** The “Account” (i.e. sub-object) will be populated for you, based on the category. You cannot change the account. If a change is needed, you can use the Modify Line/Shipping/Accounting button to change the category OR, delete the line and re-enter it with the proper category. The account will be changed automatically, to match the category. - Confirm that all Chartfields1 Chartfields2 “Accounting Lines” information has been entered correctly.  *Distribute By: Qty · SpeedChart: 60001 Accounting Lines Account: 0902 · Batch Agy: C25 · Fund: 0001 · Dept: · Program: B006 · Approp Number: A0006 · Approp Yr: AY2016 · PCA: 60001 · PC Bus Unit: · Project: ☐ Select All / Deselect All Total Amount: 100.00 USD Personalize | Find | View All First 1 of 1 Last Chartfields1 Chartfields2 Details Details 2 Asset Information Asset Information 2 Budget Information Add to Favorites Add to Template(s) Modify Line / Shipping / Accounting Delete

11. **OPTIONAL – To add "Attention To".**

Return to the **1. Define Requisition** tab and click the "Line Defaults" arrow to enter a default value for "Attention".

NOTES:

- **A.** Other defaults may be entered such as Ship To, Due Date, and Chartfields. **Note: Account Code is no longer an allowed default.**
- **B.** The defaults entered here will populate ALL requisition lines.



Create Requisition

Specify requisition name, requester, and other information that applies to the entire requisition.

Business Unit: MDJUD Administrative Office of Court
Requester: ROSE.FINNEY Rose Finney
*Currency: USD
Requisition Name: test req creation - jt
Priority: Medium

Line Defaults

Note: The defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

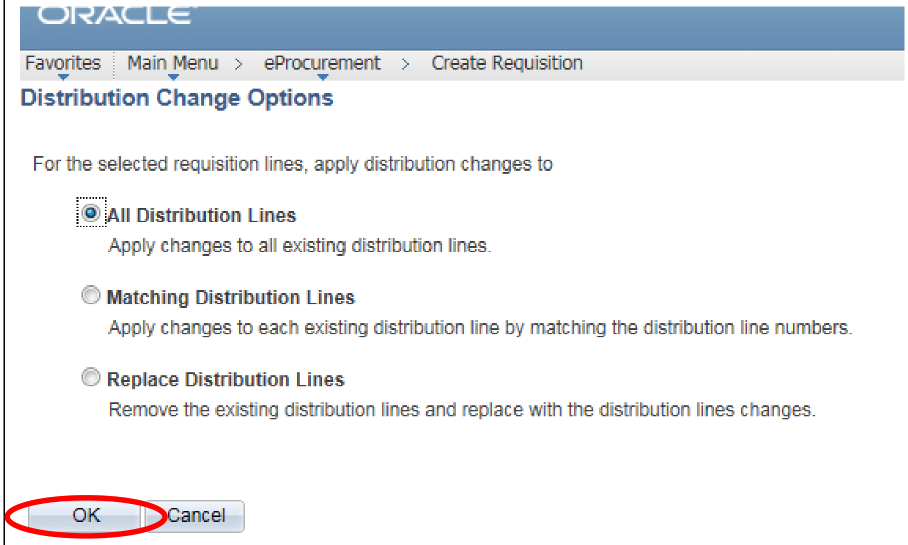
Shipping Defaults
Attention: Joe Sample

Accounting Defaults
Location: AOC
GL Unit: MDJUD

ORACLE
Favorites
Main Menu > eProcurement > Create Requisition
1. Define Requisition
2. Add Items and Services
3. Review and Submit
Vendor:
Vendor Location:
Buyer:
Category:
Unit of Measure:
Ship To:
Modify Onetime Address
Due Date:
Personalize | Find
First 1 of 1 Last
Chartfields1
Details
Asset Information
Location
GL Unit
Batch Agy
PCA
Fund
Account
Program
Approp Number
Approp Yr
Dept
PC Bus Unit
Continue

12. Click the **Continue** button.

13. Click the **OK** button to have the defaults applied to all distribution lines.



Distribution Change Options

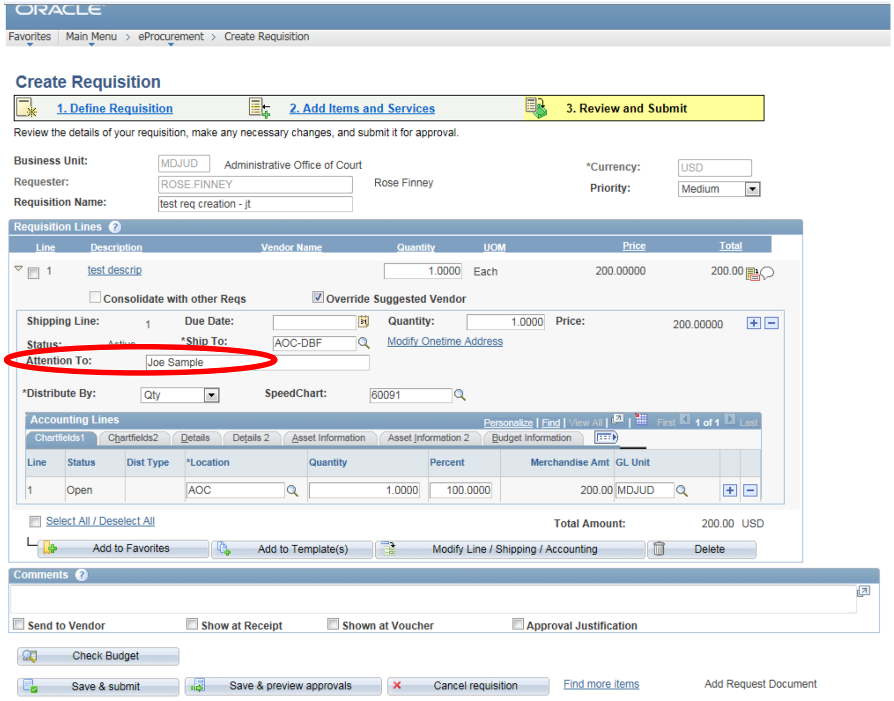
For the selected requisition lines, apply distribution changes to

● **All Distribution Lines**
Apply changes to all existing distribution lines.

○ **Matching Distribution Lines**
Apply changes to each existing distribution line by matching the distribution line numbers.

○ **Replace Distribution Lines**
Remove the existing distribution lines and replace with the distribution lines changes.

ORACLE
Favorites
Main Menu > eProcurement > Create Requisition
OK
Cancel

14.	On the **3. Review and Submit** screen, confirm that default information has been applied to all distribution lines.	

ORACLE
Favorites
Main Menu
eProcurement
Create Requisition
1. Define Requisition
2. Add Items and Services
3. Review and Submit
Personalize | Find | View All
First 1 of 1 Last
Chartfields1
Chartfields2
Details
Details 2
Asset Information
Asset Information 2
Budget Information
Select All / Deselect All
Add to Favorites
Add to Template(s)
Modify Line / Shipping / Accounting
Delete
Check Budget
Save & submit
Save & preview approvals
Cancel requisition
Find more items
Add Request Document

Create Requisition

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: MDJUD Administrative Office of Court

Requester: ROSE.FINNEY Rose Finney

Requisition Name: test req creation - jt

*Currency: USD

Priority: Medium

Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	test descrip		1.0000	Each	200.00000	200.00

☐ Consolidate with other Reqs ☑ Override Suggested Vendor

Shipping Line: 1 Due Date: Quantity: 1.0000 Price: 200.00000

Status: Active *Ship To: AOC-DBF

Attention To: Joe Sample

*Distribute By: Qty SpeedChart: 60091

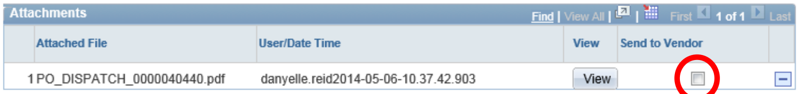
Accounting Lines

Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt	GL Unit
1	Open		AOC	1.0000	100.0000	200.00	MDJUD

Total Amount: 200.00 USD

Comments

☐ Send to Vendor ☐ Show at Receipt ☐ Shown at Voucher ☐ Approval Justification

15.	**Enter Line Comments/Attachments**	• To add comments or attchments about line items, select the 🗨 icon at the far right of the line. • Enter comments into the text box and/or click the Add Attachment button to add an attachment.  Attachments Attached File | User/Date Time | View | Send to Vendor 1 PO_DISPATCH_0000040440.pdf | danyelle.reid2014-05-06-10.37.42.903 | View | ☐ **NOTE:** Ensure that the check box for **Send to Vendor** in the attachments list has a check mark in it. This allows Procurement to view the attachment. • Click the OK button.
16.	**Save the Requisition by clicking the** Save & preview approvals **button.**	
17.	**Check budget for available funds by clicking the** Check Budget **button.**	
18.	**Submit the Requisition for approval by clicking the** Submit **button.**	

Important

This document is intended to provide a quick reference to completing standard transactions within GEARS. Please refer the appropriate User Procedures and/or online references for any corresponding policies regarding this process.